



# WHO'S WHO IN SOCIAL SECURITY

October 2025

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**A ROADMAP TO THE KEY VOICES  
IN PROGRAM AND POLICY**



**AMAC Foundation**

Supporting & Educating America's Seniors

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## Who's Who in Social Security An Introduction

In 1935, the Social Security Act was a major step forward to provide an economic foundation for America's families, from retirees to survivors, and from children to the disabled. Almost nine decades later, Social Security is crucial to the well-being of more than 66 million beneficiaries and will doubtless continue to be crucial for virtually every American in the future.

Since its launch, Social Security has evolved to meet the changing needs of the country and will undoubtedly continue to adjust along with the America's population demographics. It's clear that Social Security's future will continue to emerge at the forefront of political platforms as they unfold and as Congress deals with the financial challenges of this critical senior support program.

The Old-Age and Survivors Insurance (OASI) Trust Fund, which pays retirement and survivors benefits, and the Disability Insurance (DI) Trust Fund, which pays disability benefits, provide an accounting of Social Security's financial support. Social Security's expenditures, together totaling nearly \$1.4 trillion in 2023, are a formidable portion of our country's economic picture.

Beyond the sheer size of the OASI and DI expenditure, however, is the even more staggering fact that the Trust Funds established to handle income and disbursements from Social Security are systematically moving toward exhaustion. After amassing a reserve balance of nearly \$3 trillion, financial demographics have created a situation where Social Security's outflow exceeds its inflow.

As announced by the Social Security Board of Trustees in May of 2024, the “combined OASI and DI Trust Fund asset reserves become depleted and unable to pay scheduled benefits in full on a timely basis in 2035. At the time of depletion of these combined reserves, continuing income to the combined trust funds would be sufficient to pay 83 percent of scheduled benefits.

## **The Time for Action is Rapidly Dissolving!**

The long-term solvency of Social Security has been a steadily growing issue for some time and has reached the point where a harsh reality is in sight. The Association of Mature American Citizens (AMAC) has long been in the forefront of a fight to bring forth solutions to address this impending crisis, and has taken the initiative to advance a legislative framework to address the long-term problem. As an action-oriented and member-driven association, AMAC puts the well-being of its constituency at the top of its priority list and has been resolute in its mission to get the attention of lawmakers to develop the least disruptive solution to the problem.

Make no mistake about it...time is running out. Now is the moment to take the steps that will ensure the stability of Social Security for future generations of Americans without subjecting workers to severe consequences. “Sooner rather than later” is the catchphrase that must govern...the funding shortfalls cannot be resolved without legislative intervention. This is not a self-correcting situation.

## **Tackling the Problem**

It’s a big undertaking...we know that. And there are legions of people involved in meeting the challenge. From the Congressional Representatives we’ve elected to resolve issues like this to the Social Security Administration officials who manage the myriad complexities of the program, there are countless names and faces engaged in the process to save the program, just as there are diverse professionals laboring to create pathways to resolution. Like we said, it’s a big undertaking!

For this reason, we’ve created this “Who’s Who in Social Security” handbook for use as a guide in identifying the key players in the overall quest for a solution to Social Security’s dilemma. The material contained in this guide will serve to help point you to the people who are integral to the solution and will serve to bring you up-to-speed on the many proposed resolutions currently in play.

## **Acknowledgements**

This document is a product of the AMAC Foundation, AMAC's affiliated public benefit corporation. Its intent is to lend assistance in understanding and resolving the Social Security solvency crisis. AMAC's Founder and President, Dan Weber, initiated the creation of the first edition of the handbook in 2015, enlisting the help and support of key AMAC and AMAC Foundation contributors to bring it to fruition. As the Social Security solvency endpoint grows closer and closer, AMAC Foundation has updated the information in this compilation to reflect current assignments.

Copies of this publication can be obtained by contacting the AMAC Foundation office at 888-750-2622 or via email at [info@AmacFoundation.org](mailto:info@AmacFoundation.org).

# Social Security Administration

The Social Security Administration (SSA) is an independent agency of the U.S. federal government, with a mission to “Deliver Social Security services that meet the changing needs of the public.” With a staff of about 57,000 (and facing the potential of a 7,000-person reduction) employees spread across more than 1,300 field offices and embassy locations around the world and an online presence through SSA.gov, the Agency is for many people the face of the federal government.

The Social Security Administration (SSA) came into being on July 16, 1946. Prior to this time, the Social Security program was administered by a three-person Social Security Board. The Board was abolished in a government reorganization and replaced by the SSA, with a single Commissioner as its head. For a complete list of the 30 Social Security Commissioners from 1946 through 2019, please refer to Appendix 1.

SSA’s headquarters is in Woodlawn, Maryland. Much of the Administration’s detail claim work is performed at six large Program Service Centers located around the country. The six service centers are:

- Northeastern Program Service Center, Jamaica, Queens, New York (as of late 1980s; previously in Rego Park, Queens and College Point, Queens)
- Mid-Atlantic Program Service Center, Philadelphia, Pennsylvania
- Southeastern Program Service Center, Birmingham, Alabama
- Great Lakes Program Service Center, Chicago, Illinois
- Mid-America Program Service Center, Kansas City, Missouri
- Western Program Service Center, Richmond, California (as of mid-1970s; previously in San Francisco)

In addition, there are topical centers handling specific matters:

- Office of Earnings and International Operations, Baltimore, Maryland
- Office of Disability Operations, Baltimore, Maryland

The current oversight and management of SSA is accomplished through a hierarchical structure as shown in the charts that follow in this handbook.

## **Social Security Administration**

**www.ssa.gov**

**@SocialSecurity**

### **OASDI Trustees**

**The Board of Trustees currently consists of six members, four of whom automatically serve by virtue of their positions in the Federal Government. These four are the:**

- **Secretary of the Treasury (the Managing Trustee),**
- **Secretary of Labor,**
- **Secretary of Health and Human Services, and**
- **Commissioner of Social Security**

**Two members are appointed by the President and confirmed by the Senate. These two members serve 4-year terms. Since 2015, there have been no public trustees appointed.**

**Scott Kenneth Homer Bessent**

**Secretary of the Treasury, and Managing Trustee of the Trust Funds**

**@SecScottBessent**

**202-622-2000**

**Lori Chavez-DeRemer**

**Secretary of Labor and Trustee**

**@SecretaryLCD**

**866-487-2365**

**Robert F. Kennedy, Jr.**

**Secretary of Health and Human Services and Trustee**

**@SecKennedy**

**877-696-6775**

**Frank Bisignano**

**Commissioner of Social Security Administration**

**800-772-1213**

**Public Representatives (2)**

**Vacant**

<b>Office of the Commissioner</b>	
<p><b>Commissioner</b>  <b>Frank Bisignano</b>  <b>800-772-1213</b></p> <p><b>Social Security Administration Executive Leadership Team</b></p>	
<b>Chief of Staff &amp; Chief Risk Officer</b> Chad Poist	<b>Chief Actuary</b> Karen Glenn
<b>Chief Communications Officer</b> Nicholas Perrine	<b>Chief of Disability Adjudication</b> Jay Ortis (Acting)
<b>Chief of Field Operations</b> Andy Sriubas	<b>Chief of Processing Centers</b> Mark Quinlan
<b>Chief of Digital Services</b> Stephen Evangelista	<b>Chief Human Capital Officer</b> Florence Felix-Lawson
<b>Chief Information Officer (Core Business Functions)</b> Michael L. Russo	<b>Chief Information Officer (Technology and Customer Products)</b> Aram Moghaddassi
<b>Chief of Law, Policy, &amp; Legislative Affairs</b> Mark Steffensen	<b>Chief Financial Officer</b> Thomas Holland
<b>Chief of Security and Resiliency</b> Jessica Taylor	

# The United States Senate

Section 3 of the United States Constitution dictates “The Senate of the United States shall be composed of two Senators from each State, *chosen by the Legislature thereof*, for six Years; and each Senator shall have one Vote.<sup>1</sup>” This approach gives equal representation to states regardless of population, and helps to preserve their individual sovereignty. Accordingly, the Senate consists of 100 members, elected by popular vote for six-year, staggered terms.

The Constitution sets three qualifications for service in the U.S. Senate: age (at least thirty years of age); U.S. citizenship (at least nine years); and residency in the state a senator represents at time of election. The details of these qualifications were hammered out by the Constitution's framers during the Constitutional Convention in 1787.

Since 1789, nearly 2,000 individuals have been a senator; of these, 17 have become U.S. presidents, 14 have served as Supreme Court Justices, five have been awarded the Nobel Peace Prize, and 37 have been awarded the Presidential Medal of Freedom.<sup>2</sup>

Listed in the following pages are those senate members having a direct relationship with legislative activities concerning Social Security.

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<sup>1</sup> [https://www.senate.gov/civics/constitution\\_item/constitution.htm?vm=r](https://www.senate.gov/civics/constitution_item/constitution.htm?vm=r)

<sup>2</sup> [https://www.senate.gov/senators/facts\\_milestones.htm](https://www.senate.gov/senators/facts_milestones.htm)

## The Senate Finance Committee

finance.senate.gov



Chairman

**Mike Crapo** (R - ID)

202-224-6142

crapo.senate.gov

@MikeCrapo

**Chief of Staff: Susan Wheeler**



Ranking Member

**Ron Wyden** (D – OR)

202-224-5244

wyden.senate.gov

@RonWyden

**Chief of Staff: Jeff Michels**

### Subcommittee on Social Security, Pensions, and Family Policy

This subcommittee examines specific areas and issues related to the Finance Committee's overall jurisdiction in the revenue area of Social Security.

#### Leadership



Chair

**Chuck Grassley** (R - IA)

202-224-6020

grassley.senate.gov

@ChuckGrassley

**Chief of Staff: Jennifer Davis**



Ranking member

**Bernie Sanders** (I - VT)

202-224-5141

sanderssenate.gov

@SenSanders

**Chief of Staff: Misty Rebik**

## Majority Members



**Marsha Blackburn (R-TN)**

202-224-3344

[blackburn.senate.gov](mailto:blackburn.senate.gov)

@MarshaBlackburn

Chief of Staff: Katie Lane



**Todd Young (R-IN)**

202-224-5623

[young.senate.gov](mailto:young.senate.gov)

@SenToddYoung

Chief of Staff: John Connell

## Minority Member



**Catherine Cortez Masto (D - NV)**

202-224-3542

[cortezmasto.senate.gov](mailto:cortezmasto.senate.gov)

@SenCortezMasto

Chief of Staff: Scott Fairchild

## Remaining Members of The Senate Finance Committee

### Majority Members

**John Barrasso (R - WY)**  
202-224-6441  
@SenJohnBarrasso  
barrasso.senate.gov  
Chief of Staff: Brad Bunning

**John Cornyn (R - TX)**  
202-224-2934  
@JohnCornyn  
cornyn.senate.gov  
Chief of Staff: Drew Brandewie

**Bill Cassidy (R - LA)**  
202-224-5824  
@SenBillCassidy  
cassidy.senate.gov  
Chief of Staff: James Quinn

**Steve Daines (R - MT)**  
202-224-2651  
@SteveDaines  
daines.senate.gov  
Chief of Staff: Darin Thacker

**Ron Johnson (R-WI)**  
202-224-5323  
@SenRonJohnson  
ronjohnson.senate.gov  
Chief of Staff: Sean Riley

**James Lankford (R - OK)**  
202-224-5754  
@SenatorLankford  
lankford.senate.gov  
Chief of Staff: Derek Osborn

**Roger Marshall (R-KS)**  
202-224-4774  
@RogerMarshallMD  
marshall.senate.gov  
Chief of Staff: Brent Robertson

**Tim Scott (R - SC)**  
202-224-6121  
@SenatorTimScott  
scott.senate.gov  
Chief of Staff: Charles Cogar

### Minority Members

**Michael Bennet (D - CO)**  
202-224-5852  
@SenatorBennet  
bennet.senate.gov  
Chief of Staff: Amy Friedman

**Maria Cantwell (D - WA)**  
202-224-3441  
@senatorCantwell  
cantwell.senate.gov  
Chief of Staff: Amit Ronen

**Maggie Hassan (D - NH)**  
**202-224-3324**  
@SenatorHassan  
hassan.senate.gov  
Chief of Staff: David Christie

**Ben Ray Lujan (D - NM)**  
**202-224-6621**  
@SenatorLujan  
lujan.senate.gov  
Chief of Staff: Carlos Sanchez

**Tina Smith (D - MN)**  
202-224-5641  
@SenTinaSmith  
smith.senate.gov  
Chief of Staff: Jeff Lomonaco

**Raphael Warnock (D - GA)**  
202-224-3643  
@SenatorWarnock  
warnock.senate.gov  
Chief of Staff: Mark Libell

**Elizabeth Warren (D - MA)**  
202-224-4543  
@SenWarren  
warren.senate.gov  
Chief of Staff: Beth Pearson

**Peter Welch (D – VT))**  
202-224-4242  
@SenPeterWelch  
welch.senate.gov  
Chief of Staff:  
Alexandra Golden

# The United States House of Representatives

As per the Constitution, the U.S. House of Representatives makes and passes federal laws. The House is one of Congress's two chambers (the other is the U.S. Senate), and part of the federal government's legislative branch. Section 2 of the United States Constitution dictates that membership in the House of Representatives is apportioned to the population of each state, with each state having at least one seat. The decennial congressional district reapportionment process that follows each official census ensures that this representation stays in balance within its membership ceiling of 435 Representatives. These representatives are elected biannually for two-year terms, with elections held in even-numbered years.

19 House of Representatives members have also served as president, and 17 House Members have served on the U.S. Supreme Court.<sup>3</sup>

With respect to legislative activity involving Social Security, the House—and explicitly its Committee on Ways and Means (“Ways and Means Committee”) -- has a specific responsibility as defined in the United States Constitution. Article I, Section 7 of the Constitution states that: “All bills for raising Revenue shall originate in the House of Representatives; but the Senate may propose or concur with Amendments as on other Bills.”<sup>4</sup> Revenue-related aspects of the Social Security system ... have come within Ways and Means’ purview in the 20th century.<sup>5</sup>

Listed in the following pages are those House of Representatives members who have a direct relationship with legislative activities concerning Social Security.

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<sup>3</sup> <https://history.house.gov/People/Other-Office/Member-President/>

<sup>4</sup> <https://history.house.gov/Institution/Origins-Development/Power-of-the-Purse/>

<sup>5</sup> <https://waysandmeans.house.gov/about/>

## **The House Ways and Means Committee** **waysandmeans.house.gov**



**Chairman**  
**Jason Smith (R-MO)**  
202-225-4404  
@RepJasonSmith  
Jasonsmith.house.gov  
**Chief of Staff: Matt Meyer**



**Ranking Member**  
**Richard Neal (D-MA)**  
202-225-5601  
@RepRichardNeal  
neal.house.gov  
**Chief of Staff: Elizabeth O'Hara**

### **Subcommittee on Social Security**

The jurisdiction of the Subcommittee on Social Security shall include bills and matters referred to the Committee on Ways and Means that relate to the Federal Old Age, Survivors' and Disability Insurance System, the Railroad Retirement System, and employment taxes and trust fund operations relating to those systems. More specifically, the jurisdiction of the Subcommittee on Social Security shall include bills and matters involving title II of the Social Security Act and Chapter 22 of the Internal Revenue Code (the Railroad Retirement Tax Act), as well as provisions in title VII and title XI of the Act relating to procedure and administration.

**The House Ways and Means Committee  
Subcommittee on Social Security  
[www.waysandmeans.house.gov](http://www.waysandmeans.house.gov)**

**Leadership**



**Chair**  
**Ron Estes (R-KS)**  
202-225-6216  
@RepRonEstes  
[estes.house.gov](http://estes.house.gov)  
Chief of Staff: Joshua Bell



**Ranking Member**  
**John Larson (D-CT)**  
202-225-2265  
@RepJohnLarson  
[larson.house.gov](http://larson.house.gov)  
Chief of Staff: Scott Stephanou

**Majority Members**



**Aaron Bean (R - FL)**  
202-225-0123  
@RepAaronBean  
[bean.house.gov](http://bean.house.gov)  
Chief of Staff:  
Jamie Robinette



**Mike Carey (R - OH)**  
202-225-2015  
@RepMikeCarey  
[carey.house.gov](http://carey.house.gov)  
Chief of Staff: Kaitlyn Dwyer

**The House Ways and Means Committee  
Subcommittee on Social Security  
[waysandmeans.house.gov](http://waysandmeans.house.gov)**

**Majority Members (Cont'd)**



**Randy Feenstra (R-IA)**  
202-225-4426  
@RepFeenstra  
[feenstra.house.gov](http://feenstra.house.gov)  
Chief of Staff: Matt Leopold



**Blake Moore -UT)**  
202-225-0453  
@RepBlakeMoore  
[blakemoore.house.gov](http://blakemoore.house.gov)  
Chief of Staff: Rachel Wagley



**Nathaniel Moran (R-TX)**  
202-225-3035  
@RepNateMoran  
[moran.house.gov](http://moran.house.gov)  
Chief of Staff: Josh Bradley



**Lloyd Smucker (R-PA)**  
202-225-2013  
@RepSmucker  
[smucker.house.gov](http://smucker.house.gov)  
Chief of Staff: Noelle Britton

**The House Ways and Means Committee  
Subcommittee on Social Security  
[www.waysandmeans.house.gov](http://www.waysandmeans.house.gov)**

**Majority Members (Cont'd)**



**Rudy Yakym (R-IN)**

202-225-3915

@RepRudyYakym

[yakym.house.gov](http://yakym.house.gov)

Chief of Staff: Ben Falkowski

**The House Ways and Means Committee  
Subcommittee on Social Security  
[waysandmeans.house.gov](http://waysandmeans.house.gov)**

**Minority Members**



**Steven Horsford (D-NV)**

202-225-9894

@RepHorsford

[horsford.house.gov](http://horsford.house.gov)

Chief of Staff: Yvanna Cancala



**Gwen Moore (D – WI)**

202-225-4572

@RepGwenMoore

[gwenmoore.house.gov](http://gwenmoore.house.gov)

Chief of Staff: Sean Gard

**The House Ways and Means Committee  
Subcommittee on Social Security  
waysandmeans.house.gov**

**Minority Members (Cont'd)**



**Stacey E. Plaskett (D - VI)**  
202-225-1790  
@StaceyPlaskett  
plaskett.house.gov  
Chief of Staff:  
Angeline Muckle-Jabbar

**Terri A. Sewell (D – AL)**  
202-225-2665  
@RepTerriSewell  
sewell.house.gov  
Chief of Staff: **Hillary Beard**



**Remaining Members of the House Ways and Means  
Committee**

**Majority Members**

**Jody Arrington (R – TX)**  
202-225-4005  
@RepArrington  
arrington.house.gov

**Vern Buchanan (R - FL)**  
202-225-5015  
@VernBuchanan  
buchanan.house.gov

**Kevin Hern (R – OK)**  
202-225-2211  
@repkevinhern  
hern.house.gov

**Michelle Fischbach (R – MN)**  
202-225-2165  
@RepFischbach  
fischbach.house.gov

**Brian Fitzpatrick (R - PA)**  
202-225-4276  
@RepBrianFitz  
fitzpatrick.house.gov

**Mike Kelly (R – PA)**  
202-225-5406  
@MikeKellyPA  
kelly.house.gov

**David Kustoff (R - TN)**  
202-225-4714  
@RepDavidKustoff  
Kustoff.house.gov

**Darin LaHood (R – IL)**  
202-225-6201  
@RepLaHood  
lahood.house.gov

**Nicole Malliotakis (R - NY)**  
202-225-3371  
@RepNicole  
malliotakis.house.gov

**Carol Miller (R – WV)**  
202-225-3452  
@RepCarolMiller  
miller.house.gov

**Max Miler (R – OH)**  
202-225-3876  
@RepMaxMiller  
maxmiller.house.gov

**Greg Murphy (R - NC)**  
202-225-3415  
@RepGregMurphy  
murphy.house.gov

**David Schweikert (R – AZ)**  
202-225-2190  
@RepDavid  
schweikert.house.gov

**Adrian Smith (R – NE)**  
202-225-6435  
@RepAdrianSmith  
adriansmith.house.gov

**Greg Steube (R – FL)**  
202-225-5792  
@RepGregSteube  
steube.house.gov

**Claudia Tenney (R – NY)**  
202-225-3665  
@RepTenney  
tenney.house.gov

**Beth Van Duyne (R – TX)**  
202-225-6605  
@RepBethVanDuyne  
vanduyne.house.gov

## Remaining Members of the House Ways and Means Committee

### Minority Members

**Don Beyer (D – VA)**

202-225-4376  
@RepDonBeyer  
beyer.house.gov

**Brendan Boyle (D – PA)**

202-225-6111  
@RepBrendanBoyle  
boyle.house.gov

**Judy Chu (D - CA)**

202-225-5464  
@RepJudyChu  
chu.house.gov

**Danny Davis (D - IL)**

202-225-5006  
@RepDannyDavis  
davis.house.gov

**Susan DelBene (D – WA)**

202-225-6311  
@RepDelBene  
delbene.house.gov

**Lloyd Doggett (D - TX)**

202-225-4865  
@RepLloydDoggett  
doggett.house.gov

**Dwight Evans (D - PA)**

202-225-4001  
@RepDwightEvanx  
evans.house.gov

**Jimmy Gomez (D - CA)**

202-225-6235  
@RepJimmyGomez  
gomez.house.gov

**Jimmy Panetta (D - CA)**

202-225-2861  
@RepJimmyPanetta  
panetta.house.gov

**Linda Sanchez (D - CA)**

202-225-6676  
@RepLindaSanchez  
lindasanchez.house.gov

**Brad Schneider (D – IL)**

202-225-4835  
@RepSchneider  
schneider.house.gov

**Tom Suozzi (D - NY)**

202-225-3335  
@RepTomSuozzi  
suozzi.house.gov

**Mike Thompson (D - CA)**

202-225-3311  
@RepThompson  
mikethompson.house.gov

# Social Security Advisory Board

## Current Members

The Social Security Advisory Board (SSAB) is a bipartisan, independent federal government agency established in 1994 to advise the President, the Congress, and the Commissioner of Social Security on matters of policy and administration of the Old-Age, Survivors, and Disability Insurance and the Supplemental Security Income programs. The Board has seven members, appointed by the President, Senate and House of Representatives. All SSAB members are appointed for six-year terms (staggered), and all are subject to Senate confirmation. The SSAB meets at least six times each year.

## Functions of the Board

- Analyzing the Nation's retirement and disability systems and making recommendations with respect to how the old-age, survivors, and disability insurance program and the supplemental security income program, supported by other public and private systems, can most effectively assure economic security.
- Studying and making recommendations relating to the coordination of programs that provide health security with social security programs.
- Making recommendations to the President and to the Congress with respect to policies that will ensure the solvency of the old-age, survivors, and disability insurance program, both in the short-term and the long-term.
- Making recommendations with respect to the quality of service that the Administration provides to the public.
- Making recommendations with respect to policies and regulations regarding the old-age, survivors, and disability insurance program and the supplemental security income program.
- Increasing public understanding of the social security system.
- Making recommendations with respect to a long-range research and program evaluation plan for the Administration.
- Reviewing and assessing any major studies of social security as may come to the attention of the Board.
- Making recommendations with respect to such other matters as the Board determines to be appropriate.

# Social Security Advisory Board Current Members

## Current Members

@ssabgov

### **Amy Shuart, Chair**

10/22 – 10.28



Appointed 10/7/2022. Currently the VP, Technology & Innovation at Business Roundtable. For over a decade, Shuart worked for the Committee on Ways and Means, most recently as the Social Security Subcommittee Staff Director. Former Presidential Management Fellow at the Social Security Administration in the Office of Retirement Policy. Also worked at the Office of Management and Budget in the Medicare Branch and the White House National Economic Council

### **Jagadeesh Gokhale**

11/09 - 9/27



Reappointed 9/28/2021 (third term); Dr. Jagadeesh Gokhale is the Director of Special Projects at Penn Wharton Public Policy Initiative (Penn Wharton PPI). Senior fellow at the Cato Institute. Earlier he worked at the American Enterprise Institute as a visiting scholar. Main research fields are macro and public economics with a special focus on the effects of fiscal policy on future generations.

## **Robert Joondeph**

10/18 – 9/30

Reappointed 9/25/2024. Served as the Executive Director of Disability Rights Oregon (DRO) for over 30 years. Served as a member of the Health Evidence Review Commission, Health Services Commission, Health Fund Board, Mental Health Planning and Management Advisory Council, State Rehabilitation Commission, Governor's Task Force on Brain Injury and the Council on Developmental Disabilities. Is a graduate of Case Western Reserve Law School and Brown University.



## **Nancy Altman**

10/22 – 10/28



Reappointed June 21, 2024 (third term). 50-year background in Social Security and private pensions. Current President of Social Security Works and Chair of the Strengthen Social Security Coalition. Served as Alan Greenspan's assistant in his position as Chair of the bipartisan commission that largely developed the 1983 Social Security amendments. Author of *The Truth About Social Security*, *The Battle for Social Security* and co-author of *Social Security Works! Why Social Security Isn't Going Broke and How Expanding It Will Help Us All*.

# The Legislative Process

The primary duty of Congress is to administer the legislative process and, through this process, enact the laws that govern the country. To accomplish this, Congress annually considers thousands of individual bills via this process which, while somewhat complex, can be traced chronologically through these stages:

## Step 1 – The Introduction

All bills must be sponsored and introduced by a member of Congress, although they can originate from a variety of sources.

## Step 2 – Committee Referral

Once introduced, the bill is referred to the appropriate committee (in some cases, multiple committees) for study and assessment.

## Step 3 – Subcommittee Review

Once assigned to a focused subcommittee, the bill is researched extensively and, where appropriate, subjected to public hearings.

## Step 4 – Mark-up

Using the results of research and hearings, the bill is “marked-up” with changes and amendments and sent back to the referring committee.

## Step 5 – Committee Action

Depending on the information provided by subcommittee, the referring committee may elect to take no action (letting the bill die) or vote on whether the bill will be ordered for reporting to the House or Senate. A committee report outlining the bill’s provisions and the committee’s position on it usually accompanies the bill.

## Step 6 – Chamber Debate

Having survived committee review, the bill is next scheduled for debate on the chamber floor. At this stage, the bill can be either passed or defeated. If passed, the bill is now considered an “act.”

## The Legislative Process (Cont'd)

### Step 7 – Chamber Exchange

If the bill is passed by the House, it is then referred to the Senate for analysis and debate. If passed in step 6 by the Senate, it is similarly referred to the House. If the chamber receiving the bill is already considering a similar bill, the additional analysis and debate is generally waived. In any event, the receiving chamber may at this point approve, reject, ignore, or modify the bill.

### Step 8 – Bicameral Determination

If, after both chambers have debated the bill, there are substantial differences between the House and Senate versions, a bicameral conference committee is assigned responsibility for achieving reconciliation. The results are provided to both the House and the Senate for approval (both must approve an identical version of the bill). If there is no agreement at this point, the bill dies.

### Step 9 – Presidential Review

The jointly approved bill is now sent to the president, becoming law if it is signed. The president may allow the bill to sit unsigned for a 10-day period, which allows it to become law if Congress is in session during the period. If Congress adjourns during the 10-day unsigned period, the bill also dies (this is referred to as a “pocket veto”). The president may also veto the bill at this point and return it to Congress for further analysis and re-submission.

### Step 10 – Veto Override

If the president vetoes the bill, either directly or via a pocket veto, the rejection can be overridden by Congress by re-voting. To become law after a veto, a bill must receive affirmative votes from a two-thirds majority in both chambers.

## **“Think Tanks” Active in the Social Security Arena**

Subjects with the magnitude and breadth of Social Security require extensive, continual, and focused research on an extremely wide range of topics to ensure that all viewpoints and perspectives are given due consideration in the formulation of policy. Accordingly, a number of research institutes have evolved over the years in which highly informed professionals delve into background issues on major subjects and craft thoroughly examined positions that policy makers often consider in laying out courses of action.

In the area of Social Security, there are several major, relevant organizations that perform this service for the general public. Their material is made available to interested parties as support for the decision-making process, as advocacy support for internal and external policy-making participants, and as general reference material for other researchers and members of the public seeking to fully understand Social Security at a greater depth.

This section identifies several notable research organizations that have some level of focus on Social Security, provides contact information for these organizations, and summarizes the organizations’ scope or mission via excerpts from their respective websites.

Please note that our compilation of key organizations may have inadvertently omitted an entity involved in Social Security matters. If so, please contact the Amac Foundation at [info@amacfoundation.org](mailto:info@amacfoundation.org) to have their information added for future editions of this publication.

**The American Action Forum**

[www.americanactionforum.org](http://www.americanactionforum.org)  
1747 Pennsylvania Avenue NW  
5<sup>th</sup> Floor  
Washington DC, 20006  
202-559-6420

AAF is a center-right, independent, nonprofit 501(c)(3) institute that provides actionable research and analysis on public policy such as debt, healthcare, taxes, immigration, etc. Its goals are to “inject forward-thinking ideas into the public debate that will build a better economic future, promoting innovative, free market solutions to build a stronger, more prosperous future.

**The American Enterprise Institute**

[www.aei.org](http://www.aei.org)  
1789 Massachusetts Avenue NW  
Washington DC, 20036  
202-862-5800 Fax: 202-862-7177

AEI scholars are committed to making the intellectual, moral, and practical case for expanding freedom, increasing individual opportunity, and strengthening the free enterprise system in America and around the world. AEI’s work explores ideas that further these goals, and AEI scholars take part in this pursuit with academic freedom. AEI operates independently of any political party and has no institutional positions. AEI scholars’ conclusions are fueled by rigorous, data-driven research and broad-ranging evidence.

**Bipartisan Policy Center**

[www.bipartisanpolicy.org](http://www.bipartisanpolicy.org)  
1225 Eye Street NW Suite 1000  
Washington, DC 20005  
202-204-2400 Fax: 202-637-9220  
[bipartisaninfo@bipartisanpolicy.org](mailto:bipartisaninfo@bipartisanpolicy.org)

The Bipartisan Policy Center actively fosters bipartisanship by combining the best ideas from both parties to promote health, security, and opportunity for all Americans. Our policy solutions are the product of informed deliberations by former elected and appointed officials, business and labor leaders, and academics and advocates who represent both sides of the political spectrum. BPC focuses on health, campus free expression, energy, immigration, education infrastructure, governance, and economy.

**Brookings Institution**

www.brookings.edu  
1775 Massachusetts Ave NW  
Washington, DC 20036  
202-797-6000  
websupport@brookings.edu

The Brookings Institution is a nonprofit public policy organization based in Washington, DC. Our mission is to conduct in-depth research that leads to new ideas for solving problems facing society at the local, national and global level. Research topics cover foreign policy, economics, development, governance and metropolitan policy.

**Cato Institute**

www.cato.org  
1000 Massachusetts Ave, NW  
Washington, DC 20001  
202-842-0200

The Cato Institute is a public policy research organization dedicated to the principles of individual liberty, limited government, free markets, and peace. Its scholars and analysts conduct independent, nonpartisan research on a wide range of policy issues. Our vision is to create free, open, and civil societies founded on libertarian principles.

**Center for American Progress**

www.americanprogress.org  
1333 H Street, NW, Suite 100E  
Washington, DC 20005  
(202) 682-1611

We focus on these key priorities to build a more inclusive, progressive country by revitalizing infrastructure, spurring an equitable economic recovery, and ensuring Americans of every socioeconomic background have access to good, well-paying jobs.

**Center on Budget and Policy Priorities**

www.cbpp.org  
1275 First Street NE, Suite 1200  
Washington, DC 20002  
202-408-1080  
center@cbpp.org

We are a nonpartisan research and policy institute. We pursue federal and state policies designed both to reduce poverty and inequality and to restore fiscal responsibility in equitable and effective ways. We apply our deep expertise in budget and tax issues and in programs and policies that help low-income people, in order to help inform debates and achieve better policy outcomes.

**Center for Economic and Policy Research**

[www.cepr.net](http://www.cepr.net)  
1611 Connecticut Ave, NW, Suite 400  
Washington, DC 20009  
202-293-5380

The Center for Economic and Policy Research (CEPR) promotes democratic debate on the most important economic and social issues that affect people's lives. CEPR is committed to presenting issues in an accurate and understandable manner, so that the public is better informed.

**Center for a Responsible Federal Budget (CRFB)**

[www.crfb.org](http://www.crfb.org)  
1025 Connecticut Avenue N.W., Suite 1100  
Washington, DC 20036  
202-596-3597

The Committee for a Responsible Federal Budget (CRFB) is an independent, non-profit, bipartisan public policy organization based in Washington, D.C. that addresses federal budget and fiscal issues.

**Economic Policy Institute**

[www.epi.org](http://www.epi.org)  
1225 Eye St. NW, Suite 600  
Washington, DC 20005  
202-775-8810

EPI is an independent, nonprofit think tank that researches the impact of economic trends and policies on working people in the United States. EPI's research helps policymakers, opinion leaders, advocates, journalists, and the public understand the bread-and-butter issues affecting ordinary Americans.

**Employee Benefit Research Institute**

[www.ebri.org](http://www.ebri.org)  
901 D Street SW, Suite 802  
Washington, DC 20024  
202-659-0670  
[info@ebri.org](mailto:info@ebri.org)

The EBRI looks to contribute to, encourage, and enhance the development of employee benefit programs. They were founded in 1978 in order to conduct research as an education foundation for the private, government, and public sectors.

### **The Heritage Foundation**

www.heritage.org  
214 Massachusetts Ave NE  
Washington, DC 20002  
202-546-4400  
info@heritage.org

The mission of The Heritage Foundation is to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. Heritage staff pursues this mission by performing timely, accurate research on key policy issues and effectively marketing these findings to our primary audiences: members of Congress, key congressional staff members, policymakers in the executive branch, the nation's news media, and the academic and policy communities.

### **The Hoover Institution**

www.hoover.org  
434 Galvez Mall  
Stanford University  
Stanford, CA 94305  
650-723-1754

The Hoover Institution supports the Constitution of the United States, its Bill of Rights and its method of representative government. The principles of individual, economic, and political freedom; private enterprise; and representative government were fundamental to the vision of the Institution's founder. By collecting knowledge, generating ideas, and disseminating both, the Institution seeks to secure and safeguard peace, improve the human condition, and limit government intrusion into the lives of individuals.

### **The Independent Institute**

www.independent.org  
100 Swan Way  
Oakland, CA 94621  
510-632-1366

A non-profit, non-partisan, public-policy research and educational organization that shapes ideas into profound and lasting impact through publications, conferences, and effective multi-media programs. Our mission is to boldly advance peaceful, prosperous, and free societies grounded in a commitment to human worth and dignity.

### **The Institute for Policy Innovation**

www.ipi.org  
1320 Greenway Drive, Suite 820  
Irving, TX 75038  
972-874-5139  
ipi@ipi.org

IPI is a non-profit, non-partisan public policy "think tank" based in Irving, Texas to research, develop and promote innovative and non-partisan solutions to today's public policy problems. IPI's focus is on approaches to the strengths of individual liberty, limited government, and free markets. IPI emphasizes getting its studies into the hands of the press and policy makers so that the ideas they contain can be applied to the challenges facing us today.

### **Manhattan Institute for Policy Research**

www.manhattan-institute.org  
52 Vanderbilt Ave  
New York, NY 10017  
212-599-7000  
communications@manhattan-institute.org

The mission is to develop and disseminate new ideas that foster greater economic choice and individual responsibility. The Institute serves as a leading voice of free-market ideas, welfare reform, tort reform, proactive policing, and supply-side tax policies.

### **The Mercatus Center**

www.mercatus.org  
3434 Washington Blvd, 4th Floor  
Arlington, VA 22201  
703-993-4930 | Fax: 703-993-4935

The Mercatus Center at George Mason University is a university-based research center focusing on market-oriented ideas—bridging the gap between academic ideas and real-world problems. The Mercatus Center advances knowledge about how markets work to improve people's lives by training graduate students, conducting research, and applying economics to offer solutions to society's most pressing problems.

**The Peter G. Peterson foundation**

[www.pgpf.org](http://www.pgpf.org)  
888-C Eighth Avenue Box #144  
New York, NY 10019  
212-542-9200

Founded by Pete Peterson and led by Chairman and CEO Michael Peterson, the Foundation works with leading policy experts, elected officials, and the public to build support for solutions to put America on a sustainable fiscal path. The Foundation engages in grant-making, partnerships and research to educate and involve Americans from a variety of perspectives.

**Progressive Policy Institute**

[www.progressivepolicy.org](http://www.progressivepolicy.org)  
1200 New Hampshire Ave NW Suite 575  
Washington, DC 20036  
202-525-3926  
[Info@ppionline.org](mailto:Info@ppionline.org)

The Progressive Policy Institute is a catalyst for policy innovation and political reform based in Washington, D.C. PPI is developing fresh proposals for stimulating U.S. economic innovation and growth, equipping all Americans with the skills and assets that social mobility in the knowledge economy requires, modernizing an overly bureaucratic and centralized public sector, and defending liberal democracy in a dangerous world.

**The RAND Corporation**

[www.rand.org](http://www.rand.org)  
1776 Main Street  
Santa Monica, CA 90401  
310-393-0411 | Fax: 310-393-4818

A nonprofit, nonpartisan organization that offers solutions to policy utilizing analytical fact-based research. Over half of their staff of 1950 people hold doctorates and collectively speak 75 languages. They address global as well as domestic issues.

### **The Senior Citizens League**

seniorsleague.org  
1800 Diagonal Rd., Suite 600  
Alexandria, VA 22314  
800-333-TSCL

With more than one million supporters, The Senior Citizens League (TSCL) is one of the nation's largest nonpartisan seniors groups. Our mission is to promote and assist TSCL members and supporters, to educate and alert senior citizens about their rights and freedoms as U.S. citizens, and to protect and defend the benefits earned and paid for by senior citizens.

### **Social Security Works**

socialsecurityworks.org  
PO Box 27380  
Washington DC 20038-7380

The mission of Social Security Works is to,

- Protect and improve the economic security of disadvantaged and at-risk populations
- Safeguard the economic security of those dependent, now or in the future, on Social Security
- Maintain Social Security as a vehicle of social justice

### **The Tax Foundation**

taxfoundation.org  
1325 G St NW, Suite 950  
Washington, DC 20005  
202-464-6200

Since 1937, our principled research, insightful analysis, and engaged experts have informed smarter tax policy in the U.S. and internationally. For over 80 years, our mission has remained the same: to improve lives through tax policies that lead to greater economic growth and opportunity.

## Recent Proposals That Would Affect Trust Fund Solvency

The Trust Funds associated with Social Security (the ***Old-Age and Survivors Insurance [OASI] Trust Fund*** and the ***Disability Income [DI] Trust Fund***) are monitored and reported on annually by the Social Security Board of Trustees. An excerpt from the most recent public report from the Board points to concerns regarding the long-term financial viability of these funds: “Under the intermediate assumptions, the projected hypothetical combined OASI and DI Trust Fund asset reserves become depleted and unable to pay scheduled benefits in full on a timely basis in 2035. At the time of depletion of these combined reserves, continuing income to the combined trust funds would be sufficient to pay 83 percent of scheduled benefits.”

Various policymakers and external organizations have long recognized this impending funding problem, and a variety of proposals have been crafted to address the long-term problem. The Social Security Administration (SSA) Office of the Chief Actuary tracks these proposals and provides memoranda on the actuarial impact of these proposals, presenting the material to the public via their website ([ssa.gov/OACT/solvency/provisions](https://ssa.gov/OACT/solvency/provisions)). Projections and estimates are based on the intermediate assumptions made in the most recent Trustees Report available at the time the proposal was made.

The remainder of this section will summarize a collection of these proposals, beginning with the **Social Security Guarantee** legislative framework proposed by AMAC. For more information about AMAC’s Social Security Guarantee, visit [AMAC.us](https://amac.us).

For official proposals submitted to Congress, the material will identify the official name of the proposal and its sponsor(s).

## The AMAC Social Security Guarantee

AMAC's founder, Dan Weber, has been in the forefront of the fight to address the problems facing America's Social Security program. In AMAC's view, Social Security has two long-term weaknesses:

- (1) The level of financial support projected for future beneficiaries will be inadequate, given the evaporation of private pensions and the steadily rising cost of living. The AMAC proposal addresses this with a change to COLA adjustments that guarantees yearly increases weighted to support low incomes, and the implementation of an Early Retirement Account (ERA) designed to provide a way for workers to accumulate a financial base sufficient enough to enable retirement before becoming a Social Security beneficiary.
- (2) The program in its current configuration has been in deficit spending since 2021, causing a steady depletion of the Social Security Trust Fund reserves. If left unchecked, projections are that the Trust Fund balance will be exhausted by 2034, with the result being a substantial across-the-board reduction of payments to beneficiaries.

As an action-oriented association, AMAC is resolved to do its part to call for action on this very serious problem, and has developed a simple, actuarially sound solution to the long-term Social Security solvency problem. We've advanced this proposal on Capitol Hill, with AMAC representatives resolute in their mission to get the attention of lawmakers. Many meetings and discussions with congressional offices and their legislative staff over the past several years have explored the AMAC approach, with the result that the ideas contained in the proposal have begun to gain traction with legislators.

AMAC's proposal has three Prime Directives:

- 1) Increase benefits for those with lower earnings
- 2) Achieve solvency and ensure benefits continue
- 3) Provide a means for all earners to have more income available at retirement

## The AMAC Social Security Guarantee

**The promise to guarantee Social Security for all Americans must be kept. AMAC has examined the many proposed solutions presented in the intermediate assumptions portion of recent Trustees Reports and selected the alternatives we feel are best suited to save Social Security. We have combined these selected assumptions with several other recommendations to achieve what we believe is the best path to long-term Trust Fund solvency without raising payroll taxes.**

1

### **GUARANTEE AN ANNUAL INCREASE IN BENEFITS FOR ALL, WITH EMPHASIS ON THOSE WITH LOWER EARNINGS TO ENSURE THE PROGRAM STAYS TRUE TO ITS MISSION: KEEPING SENIORS OUT OF POVERTY.**

Ensure the annual cost-of-living adjustment (COLA) has a minimum increase of 1% to offset increasing costs for seniors, even in years where CPI is at or below zero.

Modify the current COLA methodology to increase benefits by the same dollar amount for all eligible beneficiaries, where the annual dollar increase is equal to the average benefit amount adjusted by inflation.

If Social Security benefits cannot be fully exempted from income taxation, increase the income thresholds for taxation of Social Security benefits to exempt middle-class seniors and index the levels for inflation.

2

### **GUARANTEE ACHIEVING SOLVENCY AND ENSURE BENEFITS CONTINUE WITHOUT AUTOMATIC CUTS.**

Among other options, make relatively minor adjustments to benefit calculations for high earners that would result in program savings in the long-term. For example:

- Modify the primary insurance amount calculation so that more of the average indexed monthly earnings for retirees are moved to the lower percentage tiers (progressive price indexing).
- Increase the number of years of indexed earnings in the formula used to calculate the primary insurance amount (i.e., the full retirement base benefit).
- For those beneficiaries below the annual Social Security maximum, increase the benefit available to surviving spouses.

3

### **GUARANTEE ALL EARNERS THE OPPORTUNITY TO CREATE MORE INCOME AVAILABLE AT RETIREMENT THROUGH WORK AND IMPROVED RETIREMENT SAVINGS PROGRAMS.**

Eliminate the Social Security Earnings test for early retirees who want to continue to work to be able to do so without having current benefits reduced between early and full retirement age.

Improve portability, transparency, and availability of 401k, IRA, and other retirement savings instruments to increase retirement income for current and future workers.

The goal of AMAC's Social Security Guarantee (SSG) is to preserve the program for current beneficiaries and to modernize it for successive generations. AMAC's plan is balanced and singles out no group with excessive changes. We are also confident that our blueprint, presented here as a whole, will extend the solvency of the program and prevent across the board cuts.

Our plan suggests a variety of areas for change to accomplish solvency for the long term:

- We change COLA from a straight percentage for all to a same dollar amount for all using the Chained CPI index on the average benefit, and include a 1% floor for the annual adjustment
- We propose either eliminating or at least indexing the amount where income tax is due on benefits
- We propose gradually adjusting the normal retirement age (but not early retirement age) by three years, from age 67 to age 70 consistent with increasing longevity, and index the normal retirement age to life expectancy
- We suggest changing the formula for the highest earnings such that more income is captured at the secondary bend points, consistent with the progressivity of the program
- We propose increasing the work history calculation by three years from 35 to 38
- We propose elimination of the earnings test on those who work before full retirement age
- We suggest enhancing surviving spousal benefits
- We propose improved supplemental retirement savings opportunities

Note, it must be recognized that these recommendations are interlocking to achieve full elimination of the projected funding shortfall. Caution must be taken to not “pluck” only one or two items out for passage. For example, if Congress were to only lessen income tax on benefits and/or only enhance survivor benefits, solvency would be exacerbated, as these two items would have a “cost” rather than a “savings” to the Social Security Trust Fund.

Finally, the plan here is by no means the only way to fix the solvency problem. Although we have called for no broad tax increase, some kind of increase in either the FICA/DSECA tax rate (currently 6.2%) or amount of wages captured by this tax is likely inevitable, given the urgency of the problem and compromise required in the political climate.

## SSG Recommendation Summary

Using the approximations derived from the Social Security Office of the Chief Actuary's scoring of comparable proposals, we estimate that the slate of recommendations comprising the SSG would achieve a net resolution of 101% of the long-range actuarial balance shortfall. Absent formal actuary scoring, we view these estimates as representative of a potential long-term solution subject to further discussion.

Rec.	Recommendation Description	Shortfall Impact
1.1	Equal-dollar COLA	0%
1.2	Use C-CPI-U; Align with U.S. fiscal year	-16%
1.3	1% minimum COLA	0%
3.1	Increase NRA from 67 to 70	-47%
3.2	Retain EEA at age 62	0%
3.3	Index NRA to life-expectancy	-19%* <sup>6</sup>
4	Progressive price indexing – Upper 50%	-33%
5	Increase computational yrs from 35 to 38	-10%
7	Eliminate Social Security earnings test	-1%
8	Improve supplemental savings programs	0%
2.1	Increase thresholds for income taxation	+3%
6	Improve survivor benefits	+3%
	Net effect of recommendations	<b>101%</b>
<b>Not estimated</b>		
3.4	Eliminate delayed retirement credits	-
2.2	Index taxation thresholds to inflation	-

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<sup>6</sup> \* The reduction assumed in recommendation 3.3 is included in the scoring for recommendation 3.1

# Additional Proposals to Modify Social Security

Policymakers have developed proposals and options that have financial effects on the OASDI Trust Funds. Many of these proposals and options have the intent of addressing the long-range solvency problem

In the 118<sup>th</sup> Congress, 15 such proposals were submitted. Social Security’s Office of the Chief Actuary (OCA) has prepared letters or memoranda for many of these proposals and options. Each letter or memorandum provides an actuarial analysis showing the estimated effect on the financial status of the Social Security program.

Here is a summary of the proposals evaluated by the OCA during the 118<sup>th</sup> Congress. Additional details on the evaluation results can be obtained via the OCA’s website (<https://www.ssa.gov/oact/solvency>):

Date Submitted	Submitted By	Summary
1/3/2025	Steny Hoyer, Wendell Primus	Estimates of the Financial Effects on Social Security of potential legislation to improve the solvency of the Social Security Trust Funds, requested by Representative Steny Hoyer and Wendell Primus
11/8/2024	William Villafañe Ramos	Estimated Change in Federal SSI Program Cost for Expanding SSI Eligibility to Residents of Puerto Rico, and Estimated Change in OASDI Program Cost for Eliminating the Application of WEP and GPO Provisions for OASDI Beneficiaries Receiving a Pension Based on Work in Puerto Rico That Was Not Covered Under the OASDI

		Program, requested by William Villafañe Ramos
9/25/2024	Peter Welch	Estimate of the Financial Effects on the Social Security Trust Funds of the “Social Security Survivor Benefits Equity Act,” introduced on September 25, 2024 by Senator Peter Welch
7/31/2024	Mazie Hirono, Jill Tokuda	Estimate of the Financial Effects on the Social Security Trust Funds of the “Protecting and Preserving Social Security Act,” introduced on July 31, 2024 by Senator Mazie Hirono and Representative Jill Tokuda
4/18/2024	Debbie Stabenow, Susan Collins	Estimate of the Financial Effects on the Social Security Trust Funds of the “We Can't Wait Act of 2024,” introduced on April 18, 2024 by Senators Debbie Stabenow and Susan Collins
1/29/2024	Sherrod Brown, Bill Cassidy	Estimated Change in Federal SSI Program Cost from Enacting S. 2767, the “SSI Savings Penalty Elimination Act,” introduced on September 12, 2023 by Senators Sherrod Brown and Bill Cassidy
1/25/2024	Angie Craig	Estimate of the Financial Effects on the Social Security Trust Funds of the “You Earned It, You Keep It Act,” introduced on January 25, 2024 by Representative Angie Craig
11/15/2023	Mike Lee, Diana Harshbarger	Estimate of the Financial Effects on the Social Security

		Trust Funds of the “Immediate Access for the Terminally Ill Act,” introduced on November 15, 2023 by Senator Mike Lee and Representative Diana Harshbarger
9/5/2023	Jodey Arrington	Estimate of the Financial Effects on the Social Security Trust Funds of the “Equal Treatment of Public Servants Act of 2023,” introduced on September 5, 2023 by Representative Jodey Arrington
7/12/2023	John Larson	Estimates of the Financial Effects on Social Security of Enacting the “Social Security 2100 Act,” introduced on July 12, 2023 by Ranking Member Larson
7/11/2023	Sheldon Whitehouse, Brendan Boyle	Estimates of the Financial Effects on Social Security of Enacting the “Medicare and Social Security Fair Share Act,” introduced on April 18, 2023 by Chairman Whitehouse and on July 11, 2023 by Ranking Member Boyle
6/22/2023	Ron Wyden, Bill Cassidy	Estimate of the Financial Effects on the Social Security Trust Funds of the “Work Without Worry Act,” introduced on June 22, 2023 by Chairman Wyden and Senator Cassidy
6/21/2023	Richard Neal	Estimates of the Financial Effects on Social Security of the “Public Servants Protection and Fairness Act of 2023,”

		introduced on June 21, 2023 by Ranking Member Richard Neal
2/13/2023	Bernie Sanders	Estimate of the Financial Effects on Social Security of the "Social Security Expansion Act," introduced on February 13, 2023 by Senator Bernie Sanders
1/31/2023	Gwen Moore	Estimate of the Financial Effects on Social Security of the "Social Security Enhancement and Protection Act of 2023," introduced on January 31, 2023 by Representative Gwen Moore

## Common Acronym Reference List

ACA: Affordable Care Act  
AIME: Average Indexed Monthly Earnings  
ALJ: Administrative Law Judge  
AOD: Alleged Onset of Disability or Alleged Onset Date  
AWI: Average Wage Index  
CDR: Continuing Disability Review  
CDB: Childhood Disability Benefits  
CHIP: Children's Health Insurance Program  
COLA: Cost of Living Adjustment  
CPI-E: Consumer Price Index for the Elderly  
CPI-W: Consumer Price Index for Urban Wage Earners and Clerical Workers  
DAC: Disabled Adult Child  
DHHS/HHS: Department of Health and Human Services  
DI: Disability Insurance  
DOE: Date of Entitlement  
EPE: Extended Period of Eligibility  
ER: Earnings Record  
FBR: Federal Benefit Rate  
FRA: Full Retirement Age  
GPO: Government Pension Offset  
HI: Hospital Insurance  
IRWE -- Impairment-Related Work Expense  
IWP: Individual Work Plan  
LSDP: Lump Sum Death Payment  
NH: Number Holder  
NRA: Normal Retirement Age  
OESP: Office of Employment Support Programs  
OASDI: Old Age and Survivor's Disability Insurance  
OASI: Old Age and Survivor's Insurance  
PAS: Personal Assistance Service  
PASS: Plan for Achieving Self-Support  
PIA: Primary Insurance Amount  
PSA: Personal Savings Account  
QC: Quarter of Coverage  
SS: Social Security  
SSA: Social Security Administration  
SSI: Supplemental Security Income  
SSDI: Social Security Disability Insurance  
SGA: Substantial Gainful Activity  
Tax Max: Taxable Maximum  
TWP: Trial Work Period  
WEP: Windfall Elimination Provision

YOC: Year of Coverage

## Further Reading on Social Security\*

### **Aaron, Henry J.**

- ~ *Should the United States Privatize Social Security?* (1999); ISBN: 978-0-2620-1174-7
- ~ *Countdown to Reform: The Great Social Security Debate* (1998); ISBN: 989-0-9807-8430-9
- ~ *Can America Afford to Grow Old: Paying for Social Security* (1989); ISBN: 978-0-8157-0043-2
- ~ *Economic Effects of Social Security* (1982); ISBN: 978-0-8157-0029-6
- ~ *Social Security: Perspectives for Reform* (1968); ISBN: 978-0-8157-6974-3

### **Aasen, Henriette Sinding**

- ~ *Juridification and Social Citizenship in the Welfare State* (2014); ISBN: 978-1-7834-7022-8

### **Achenbaum, W. Andrew**

- ~ *Social Security: Visions and Revisions* (1986); ISBN: 978-0-5213-2866-1
- ~ *Shades of Gray: Old Age, American Values and Federal Policies Since 1920* (1983); ISBN: 978-0-3160-0652-1
- ~ *Old Age in the New Land: The American Experience Since 1790* (1978); ISBN: 978-0-8018-2107-3

### **Adler, Michael**

- ~ *The Sociology of Social Security* (1992); ISBN: 978-0-7486-0325-1

### **Adams, Sandra J**

- ~ *Government: Servant or Master?* (2025); ISBN: 10 1571024883

### **Ahmad, Ehtisham**

- ~ *Social Security in Developing Countries* (1991); 978-0-1982-3300-8

### **Allen, Angela**

- ~ *Creative SSA Early-Retirement Claiming Strategies for the Class of 1968* (2014); ISBN: 978-1-5032-5536-0
- ~ *CDRs: The Ten Most Important Things You Need to Know* (2014); ISBN: 978-1-5032-4998-1
- ~ *Win Your Benefits! How to Win – And Hang on to – Your SSI and Social Security Disability Payments!* (2013); ISBN: 978-1-4611-1389-8

### **Altman, Nancy**

- ~ *Social Security Works! Why Social Security Isn't Going Broke and How Expanding It Will Help Us All* (2015); ISBN: 978-1-6209-7037-9
- ~ *The Battle for Social Security: From FDR's Vision to Bush's Gamble* (2009); ISBN: 978-0-4717-7172-2

### **Altmeyer, Arthur J.**

- ~ *The Formative Years of Social Security: A Chronicle of Social Security Legislation and Administration, 1934-1954* (1966); ISBN: 978-0-2990-3824-3

### **Alvarez, Jacob T.**

- ~ *Social Security: Background, Issues and Proposals* (2010); ISBN: 978-1-6176-1469-9

### **Amado, Nicole L.**

- ~ *The Dynamics of Disability: Measuring and Monitoring Disability for Social Security Programs* (2002); ISBN: 978-0-3090-8419-2

### **Andrews, William H.**

- ~ *Social Security: New Issues and Developments* (2008); ISBN: 978-1-6045-6243-9

### **Anforth, Allan**

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## Interesting Facts about Social Security

For most of our working lives, the concept of Social Security has been a bit abstract. Yes, we notice it every time we look at a paystub or certainly when we go through the annual income tax filing process and, yes, we dream about the day when we finally reach the golden age of retirement and we begin to see a return on what we've paid in through the years. But for the most part it's a largely intangible concept during our early and mid-life working years.

As we approach that retirement phase, or when other factors cause us to think about Social Security and its place in American history, many of us tend to wonder about the lesser-known background items related to this enormous system and its origins. Here are a few little-known facts about Social Security that tend to keep inquiring minds awake at night:

- Social Security will mark its 90th anniversary in August of 2025. The program was signed into law on August 14, 1935 by President Franklin D. Roosevelt.
- Monthly benefits were first paid in January 1940. The first monthly Social Security benefit check was paid to Ida May Fuller, a legal secretary, in the amount of \$22.54.
- Since its inception, over 450 million different Social Security numbers have been issued (about 5.5 million new ones each year).
- Social Security numbers are not reused upon death.
- The 3-2-4 structure of your Social Security number has a purpose: the first three digits represent where you're from (prior to 1972, they identified the state where you originally applied, and after that they identified the zip code of your mailed application). The early program administrators needed some way to organize the filing cabinets into sub-groups, to make them more manageable, and this is the scheme they came up with.
- No Social Security numbers have ever been issued with 000, 666, or 900-999 as the first three digits, or zeros in the middle two or last four positions.
- There are three different types of Social Security cards issued: the card issued to U.S. citizens and permanent residents; a "not valid for employment" version; and a "valid for work only with DHS authorization" version.
- The initial Social Security withholding rate was set at 2% (combined employee/employer) up to a maximum of \$3,000.

There are also some anecdotal items that have transpired during Social Security's almost 90-year history, like the amusing tale of Hilda Schrader Whitcher. It seems her employer, E.H. Ferree Company of Lockport, NY elected to imitate reality by using her Social Security number on an insert in the wallets they were selling. Despite steps that were taken to ensure understanding that the insert was for display purposes only, more than 40,000 people claimed the number as their own. The result was chaotic for Mrs. Whitcher, who was subsequently issued a replacement number.

## Interesting Facts about Social Security (cont'd)

Then there's the recurring problem of accuracy in Social Security's Death Master File. The website [NPR.org](http://www.npr.org) observes that this file lists over "6.5 million 'people' with Social Security numbers over the age of 112," despite findings by the Gerontology Research Group that there have been only 35 people known to have reached the age of 112 in the world.<sup>7</sup> And, "A recent government audit revealed that the Social Security Administration had incorrectly listed 23,000 people as dead in a two-year period. These people have sometimes faced difficulties in convincing government agencies that they are actually alive..."<sup>8</sup> It's important to understand that Social Security's Death Master File has multiple purposes, including research on mortality rates, fraud prevention, and genealogy.

So, it's logical that with a program of this size there is an almost unlimited opportunity for interested parties to engage in lively conversation about the many nuances and details surrounding Social Security. Here are a few additional points that will help you be prepared to join in any impromptu debates you may encounter along the way:

- Over 68 million people received Social Security benefits in February 2025.<sup>9</sup>
- The total paid out by Social Security in November 2019 was over \$126 billion.
- The average monthly payout was \$1,839 per beneficiary.
- Automatic Cost of Living Adjustments (COLAs) were first initiated in 1972, and currently use CPI-W (Consumer Price Index for Urban Clerical and Wage Earners) as its factor.
- People with lower incomes receive higher ratios of annual benefits to career earnings.
- For workers who earned average wages and retired at the age of 65 in 1980, it took 2.8 years of receiving old-age benefits to recover the value of their payroll taxes (including interest). For workers who retired in 2003, it will take 17.4 years. For workers who will retire in 2020, it will take 21.6 years. This assumes Social Security will have enough money to pay scheduled benefits for this entire period, which it is not projected to have.<sup>10</sup>
- The amount of your average earnings that Social Security retirement benefits replace depends on your earnings and when you choose to start benefits. If you start benefits in 2025 at your "full retirement age" (see our "Full retirement age"

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<sup>7</sup> <https://www.npr.org/sections/thetwo-way/2015/03/10/392112708/6-5-million-social-security-numbers-linked-to-those-112-or-older>

<sup>8</sup> [https://en.wikipedia.org/wiki/Social\\_Security\\_Death\\_Index](https://en.wikipedia.org/wiki/Social_Security_Death_Index)

<sup>9</sup> [https://www.ssa.gov/policy/docs/quickfacts/stat\\_snapshot/](https://www.ssa.gov/policy/docs/quickfacts/stat_snapshot/)

<sup>10</sup> <http://www.justfacts.com/socialsecurity.asp>

section), this percentage ranges from as much as 79% for very low earners, to about 43% for medium earners, to about 28% for maximum earners.<sup>11</sup>

- All taxes that have been paid into the Social Security system since its inception have already been (1) spent to pay for benefits, (2) spent to fund the operation of the program, or (3) loaned to the federal government.<sup>12</sup>

Through history, there have been a number of unique and celebrated people surfacing in the annals of Social Security. Among them are:

<b>Ackerman, Ernest</b>	<ul style="list-style-type: none"> <li>• First recipient of a lump-sum Social Security benefit check. In January 1937, he received a check in the amount of 17 cents...a return on his total investment of 5 cents.</li> </ul>
<b>Altmeyer, Arthur J.</b>	<ul style="list-style-type: none"> <li>• Part of the committee to draft the original legislative proposal in 1934</li> <li>• Chairman of the Social Security Board 1937</li> <li>• One of the few responsible for how Social Security exists today</li> </ul>
<b>Burns, Eveline M.</b>	<ul style="list-style-type: none"> <li>• Economist and educator at Columbia University</li> <li>• Member of the Committee on Economic Security in 1934 working on employment security issues</li> <li>• Authored three books on Social Security</li> <li>• Consultant to the Social Security Board in 1936</li> </ul>
<b>Epstein, Abraham</b>	<ul style="list-style-type: none"> <li>• Early advocate of Old Age Security</li> <li>• His “European Plan” for social security was adopted by New York in 1935</li> <li>• Advocated for Social Welfare and Unions</li> </ul>
<b>Fuller, Ida May</b>	<ul style="list-style-type: none"> <li>• First person to receive monthly benefit pay outs</li> <li>• First check on January 31, 1940 for the amount of \$22.54</li> </ul>
<b>Fuller, Mary Falvey</b>	<ul style="list-style-type: none"> <li>• One of the first two Public Trustees appointed as non-government overseers of Social Security and Medicare Trust Funds</li> </ul>
<b>Perkins, Frances</b>	<ul style="list-style-type: none"> <li>• Appointed as Franklin Roosevelt’s Secretary of Labor in 1933</li> <li>• First woman to hold a cabinet position in the United States</li> <li>• Played key role in writing New Deal legislation, including minimum wage laws</li> <li>• Involved in every aspect of creating the Social Security of 1935</li> </ul>
<b>Roosevelt, Franklin D.</b>	<ul style="list-style-type: none"> <li>• Signed the Social Security Act on August 14, 1935</li> <li>• In October 1929, in response to the Great Depression, started a relief system that later became the model for the New Deal’s Federal Emergency Relief Administration (FERA)</li> </ul>
<b>Winant, John G.</b>	<ul style="list-style-type: none"> <li>• Appointed as the first head of the Social Security Board in 1935 by Franklin Roosevelt</li> <li>• Held the position until 1937</li> </ul>

<sup>11</sup> <https://www.ssa.gov/pubs/EN-05-10024.pdf>

<sup>12</sup> <http://www.justfacts.com/socialsecurity.asp#f67>

## Appendix 1 – Former SSA Commissioners

Commissioner	Term of Service	
	From	to
Arthur J. Altmeyer	July 16, 1946	April 10, 1953
William L. Mitchell (Acting)	April 11, 1953	November 23, 1953
John W. Tramburg	November 24, 1953	July 31, 1954
Charles I. Schottland	August 23, 1954	December 31, 1958
William L. Mitchell	February 4, 1959	April 3, 1962
Robert M. Ball	April 17, 1962	March 17, 1973
Arthur E. Hess (Acting)	March 18, 1973	October 24, 1973
James B. Cardwell	October 25, 1973	December 12, 1977
Don I. Wortman (Acting)	December 13, 1977	October 4, 1978
Stanford G. Ross	October 5, 1978	December 31, 1979
Herbert R. Doggette (Acting)	January 1, 1980	January 2, 1980
William J. Driver	January 3, 1980	January 19, 1981
Herbert R. Doggette (Acting)	January 20, 1981	May 5, 1981
John A. Svahn	May 6, 1981	September 12, 1983
Martha A. McSteen (Acting)	September 14, 1983	June 25, 1986
Dorcas R. Hardy	June 26, 1986	July 31, 1989
Gwendolyn S. King	August 1, 1989	September 30, 1992
Louis D. Enoff (Acting)	October 1, 1992	July 18, 1993
Lawrence H. Thompson (Acting)	July 19, 1993	October 7, 1993
Shirley S. Chater	October 8, 1993	February 28, 1997
John J. Callahan (Acting)	March 1, 1997	September 28, 1997
Kenneth S. Apfel	September 29, 1997	January 20, 2001
William Halter (Acting)	January 21, 2001	March 28, 2001
Larry G. Massanari (Acting)	March 29, 2001	November 9, 2001
Jo Anne B. Barnhart	November 9, 2001	January 19, 2007
Linda S. McMahon (Acting)	January 20, 2007	February 11, 2007
Michael J. Astrue	February 12, 2007	February 13, 2013
Carolyn W. Colvin (Acting)	February 14, 2013	January 20, 2017
Nancy A. Berryhill (Acting)	January 21, 2017	June 17, 2019
Andrew M. Saul	June 17, 2019	July 9, 2021
Kilolo Kijakazi	July 9, 2021	December 20, 2023
Martin O'Malley	December 20, 2023	November 29, 2024
Carolyn W. Colvin	November 30, 2024	January 20, 2025
Michelle King	January 20, 2025	February 16, 2025
Leland Dudek (Acting)	February 16, 2025	May 6, 2025
Frank Bisignano	May 6, 2025	

## Appendix 2 – Most Recent Former Members of the SSAB

<p><b>Henry J. Aaron</b> (09/14 – 09/20; Chair 2014-17)</p>	<ul style="list-style-type: none"> <li>• A founding member, Vice-President, and Board Chair of the National Academy of Social Insurance.</li> <li>• Bruce and Virginia Mac-Laury Chair and Senior Fellow in the Economic Studies Program at the Brookings Institution</li> </ul>
<p><b>Dana Bilyeu</b> 12/06 – 9/10</p>	<ul style="list-style-type: none"> <li>• Executive Officer of the Public Employees' Retirement System of Nevada</li> <li>• Serves on the Public Employee Advisory Board for the International Foundation of Employee Benefit Plans</li> </ul>
<p><b>Alan L. Cohen</b> 9/14 – 9/16</p>	<ul style="list-style-type: none"> <li>• Previously served as Senior Budget Advisor and Chief Counselor for Social Security for the U.S. Senate Committee on Finance from 2001-2012</li> </ul>
<p><b>Lanhee Chen</b> 9/13 – 9/18</p>	<ul style="list-style-type: none"> <li>• Research Fellow at the Hoover Institution</li> <li>• Director of Domestic Policy Studies, Lecturer in the Public Policy Program, Lecturer in Law and affiliate of the Institute for International Studies at Stanford University</li> <li>• MemberBoard of Trustees of the Junior Statesmen Foundation</li> </ul>
<p><b>Bernadette Franks-Ongoy</b> 01/13 – 09/18</p>	<ul style="list-style-type: none"> <li>• Executive Director of Disability Rights Montana</li> <li>• Former President of the National Disability Rights Network</li> </ul>
<p><b>Dorcas R. Hardy</b> 04/02 – 09/16</p>	<ul style="list-style-type: none"> <li>• President of D. R. Hardy &amp; Associates Former Social Security Administration Commissioner from 1986 - 1989</li> </ul>

## Appendix 2 – Most Recent Former Members of the SSAB (Cont'd)

<p style="text-align: center;"><b>Kim Hildred</b> (09/16-09/22; Chair 2017-21)</p>	<ul style="list-style-type: none"> <li>• Appointed by the House on September 27, 2016</li> <li>• President of Hildred Consulting, LLC.</li> <li>• Former Staff Director of the House Ways and Means Subcommittee on Social Security in the US House of Representatives</li> </ul>
<p style="text-align: center;"><b>Marsha Katz</b> 11/06 - 9/12</p>	<ul style="list-style-type: none"> <li>• Project Director at the University of Montana Rural Institute in Missoula</li> <li>• Former Vice President of the Association for Community Advocacy in Ann Arbor, Michigan</li> </ul>
<p style="text-align: center;"><b>Barbara Kennelly</b> 01/06 – 09/17</p>	<ul style="list-style-type: none"> <li>• Former President, National Committee to Preserve Social Security and Medicare</li> <li>• Former member of the U.S. House of Representatives, 1st District of Connecticut</li> </ul>
<p style="text-align: center;"><b>Mark J. Warshawsky</b> 12/06 – 9/12</p>	<ul style="list-style-type: none"> <li>• Director of Retirement Research at Watson Wyatt Worldwide</li> <li>• Serves on the Advisory Board of the Pension Research Council of the Wharton School</li> </ul>

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## Our Foundation

The AMAC Foundation has now been in operation for more than a decade, and in that time has created a solid footprint in service to America's seniors. These services have taken the form of public seminars and workshops on topics vital to an aging constituency, the operation of a vigorous online presence designed to meet the needs of seniors, and the provision of direct services in the form of credible answers to questions about the mechanics of America's Social Security program.

This publication represents an extension of the AMAC Foundation's outreach efforts, and as noted in the Introduction, is intended as a guide in identifying the key players in the overall quest for a solution to Social Security's solvency dilemma. It's one of the many ways AMAC is playing an active role in addressing Social Security's long-term funding problems, with the hope of calling additional attention to the issue.

We need your help in this venture and as we continue to build the programs and projects that are so vital to America's seniors. Take this opportunity to co-invest in our mission—a mission that is making a difference on so many fronts and in so many lives.

The AMAC Foundation is a 501(c)(3) nonprofit organization. Your donation is tax deductible to the extent allowable under current law. Visit our website ([AMACFoundation.org](http://AMACFoundation.org)) for more information.

Thank you!

